

STATE OF UTAH BENEFITS CHECKLIST FOR TERMINATING/RETIRING EMPLOYEES
26-Feb-07

This checklist is for terminating/retiring employees who plan to continue health and life insurance or who plan to access their pension and deferred savings plans. COBRA is used to extend health insurance while HIPPA is used through PEHP to transport health insurance to another setting. A 60 day time period is allowed in deciding to continue life and health insurance coverage.

BENEFIT

Health Insurance*,**

	<u>Benefit Provider</u>	<u>Access to Benefit</u>	<u>Who Administers</u>	<u>Who Processes</u>	<u>Where to Apply First</u>
Summit Care 1,2,3 - St Pd	Altius	Thru COBRA/HIPPA	Altius	Altius	PEHP
PEHP Preferred Care 1,2,3 - St Pd	PEHP	Thru COBRA/HIPPA	PEHP	PEHP	PEHP
PEHP Advantage Care 1,2,3 - St Pd	PEHP	Thru COBRA/HIPPA	PEHP	PEHP	PEHP
PEHP Traditional Dental 1,2,3 - St Pd	PEHP	Thru COBRA/HIPPA	PEHP	PEHP	PEHP
PEHP Pref. Care Dental 1,2,3 - St Pd	PEHP	Thru COBRA/HIPPA	PEHP	PEHP	PEHP
DentalSelect 1,2,3 - St Pd	Altius	Thru COBRA/HIPPA	Altius	Altius	PEHP
Opticare 1,2,3	Standard Optical	Thru Standard Optical	Standard Optical	Standard Optical	Standard Optical
EyeMed	EyeMed	Thru EyeMed	EyeMed	EyeMed	EyeMed

Life Insurance***

	<u>Benefit Provider</u>	<u>Access to Benefit</u>	<u>Who Administers</u>	<u>Who Processes</u>	<u>Where to Apply First</u>
PEHP \$25,000 Term Life - St Pd	PEHP	Continuation by PEHP	PEHP	PEHP	PEHP
PEHP Additional Term Insurance	PEHP	Continuation by PEHP	PEHP	PEHP	PEHP
PEHP Term Life - Spouse	PEHP	N/A	PEHP	PEHP	PEHP
PEHP Child Life	PEHP	N/A	PEHP	PEHP	PEHP
Line of Duty Policy - \$50,0000	PEHP	N/A	PEHP	PEHP	PEHP
AD&D	PEHP	N/A	PEHP	PEHP	PEHP

Work Insurance

	<u>Benefit Provider</u>	<u>Access to Benefit</u>	<u>Who Administers</u>	<u>Who Processes</u>	<u>Where to Apply First</u>
Long Term Disability - St Pd	PEHP	N/A	PEHP	PEHP	N/A
Unemployment Insurance - St Pd	Workforce Services	Workforce Services	Workforce Services	Workforce Services	N/A
Workers Compensation - St Pd	WC Fund	N/A	WC Fund	WC Fund	N/A

Voluntary Benefits

	<u>Benefit Provider</u>	<u>Access to Benefit</u>	<u>Who Administers</u>	<u>Who Processes</u>	<u>Where to Apply First</u>
MetLife Insurance - Auto/Home	MetLife	Extend thru MetLife	DHRM/Moreton Co.	MetLife	1-800-GETMET8
Liberty Mutual - Auto/Home	Liberty Mutual	Extend thru Liberty Mutual	DHRM/Liberty Mutual	Liberty Mutual	1-800-634-4201
Hyatt Legal Plan	Hyatt Legal Services	Extend thru Hyatt	Moreton Co/Hyatt	Hyatt	1-800-GETMET8
Long-term Care	Aetna	Extend thru Aetna	Aetna	Aetna	1-800-280-8141

Leave/Work Benefits

	<u>Benefit Provider</u>	<u>Access to Benefit</u>	<u>Who Administers</u>	<u>Who Processes</u>	<u>Where to Apply First</u>
Annual Leave	DHRM	Payout of annual leave	DHRM	Agencies	Your Agency
Sick Leave	DHRM	25% Mandatory Contribution to 401(k)	DHRM	Agency Retirement Expert/Payroll	Your Agency
Sick Leave	DHRM	Lapses upon termination	DHRM	Agencies	Your Agency
Converted Sick Leave	DHRM	25% Mandatory Contribution to 401(k)	DHRM	Agency Retirement Expert/Payroll	Your Agency
Converted Sick Leave	DHRM	Cashed out upon termination	DHRM	Agencies	Your Agency
Sick Leave Retirement Incentive	DHRM	Retirees only	DHRM	Agency Retirement Expert/Payroll	Your Agency

<u>Leave/Work Benefits (Cont'd)</u>	<u>Benefit Provider</u>	<u>Access to Benefit</u>	<u>Who Administers</u>	<u>Who Processes</u>	<u>Where to Apply First</u>
Flex\$ Program	DHRM	N/A	PEHP	Wells Fargo	N/A
Education Assistance Program	Agencies	N/A	Agencies	Agencies	N/A
<u>Retirement/Pension Benefits</u>	<u>Benefit Provider</u>	<u>Access to Benefit</u>	<u>Who Administers</u>	<u>Who Processes</u>	<u>Where to Apply First</u>
FICA/Medicare - St Pd	Social Security/PEHP	For eligible retirees	St Finance	St Finance	Social Security/PEHP
State Retirement - St Pd	URS	For eligible retirees	URS	URS	URS
401K - St Pd	URS	For eligible retirees	URS	URS	URS
457	URS	For eligible retirees	URS	URS	URS
Public Safety Retirement - St Pd	URS	For eligible law enf. ret.	URS	URS	URS
<u>Miscellaneous</u>	<u>Benefit Provider</u>	<u>Access to Benefit</u>	<u>Who Administers</u>	<u>Who Processes</u>	<u>Where to Apply First</u>
UPEA	UPEA	Retirees only	UPEA	UPEA	UPEA
UAGE	UAGE	Retirees only	UAGE	UAGE	UAGE
(For UPEA & UAGE members who are retiring from state government, membership dues will automatically be deducted from retirement check unless instructed otherwise by association)					
Mountain America Credit Union	Mountain America	Extended through Mtn America	Mountain America	Mountain America	Mountain America
Beehive Credit Union	Beehive Credit Union	Extended through Beehive	Beehive Credit Union	Beehive Credit Union	Beehive Credit Union

*1,2,3 = single, double, and family coverage

**St Pd = State Paid

*** = Subject to plan requirements

For retiring employees who want to continue dental and/or life insurance: If retiring prior to age 65, dental coverage is available but the retiree will need to pay 100% of the premium. No dental coverage is available after age 65. Retiring employees may continue up to 25% of the life insurance coverage that they had as an employee for both the basic and the voluntary coverage and are responsible for the premiums.

Telephone Numbers and Addresses in Alphabetical Order

Aetna (800) 280-8141 - P.O. Box 14550, Lexington, KY 40512-4550

Altius/Summit Care (801) 323-6200, (800) 377-4161 -10421 South Jordan Parkway; South Jordan, Utah 84095 - Express Scripts Pharmacy (800) 763-5550

Beehive Credit Union - www.beehivecredit.com - various locations in phone book

Blomquist Hale Life Assitance Counseling through PEHP - (801) 262-9619 SLC, (801) 225-9222 Orem, (435) 752-3241 Logan, (801) 392-6833 Ogden, (435) 723-1610 Brigham City, (800) 800-926-9619 other areas

Dental Select - (800) 800-999-9789

DHRM (801) 538-3025 - 2120 State Office Building; Salt Lake City, Utah 84114

EyeMed (866) 939-3633

Hyatt Legal Services (800-821-6400) - 1111 Superior Avenue, Cleveland, OH 44114

Liberty Mutual (800) 634-4201 SLC - 756 E Winchester Str Ste 250, (800) 365-2004 Layton, - 1530 Layton Hills Parkway Ste 100, (800) 654-5502 Orem - 51 West University Parkway

Metpay 1-800-GETMET1- Fred A. Moreton Company; 709 East South Temple; Salt Lake City, Utah 84102

Mountain America Credit Union - www.mtnamerica.org - various locations in phone book

PEHP (801) 366-7555 - Customer Service - 560 East 200 South; Salt Lake City, Utah 84102 - Merk Medco Pharmacy

Opticare (800) 363-0950

State Finance (801) 538-3056 - 2110 State Office Building; Salt Lake City, Utah 84114

Utah Retirement Systems (URS) (801) 366-7701- 540 East 200 South; Salt Lake City, Utah 84102

Utah Retirement Systems (URS) 401k (801) 366-4422 - 540 East 200 South; Salt Lake City, Utah 84102

UAGE (801) 483-1200, (800) 483-2140 - 2022 South 2100 East, Suite 204, Salt Lake City, Utah 84108

UPEA (801) 264-8732 1000 W. 5370 S; Murray, UT 84123